THE TAX HANDLER™

for the ATARI 400/800

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4	SCHEDULE A
5	SCHEDULE G

$34.95 Cassette, $39.95 Disk

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THE TAX HANDLER™

developed by

The Programmer's Institute

For The Atari 400/800

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THE TAX HANDLER™

I. Introduction

Welcome to the TAX HANDLER! With this software, your Atari 400/800 can now help **you** prepare your taxes. The Tax Handler facilitates tax preparation by doing the calculating for you. Using the graphic capabilities of the Atari, each screen is formated exactly as the tax form. All you do is input data, the programs do the rest!

All programs are menu-driven and all data can be saved to cassette or disk.

A. SPECIFIC FEATURES

- Form 1040 (Long Form): covers filing status, exemptions, income, income adjustments, computation of tax, tax credits, taxes (other), and payments or balance/refund due.

- Schedule A - Itemized Deductions: reviews medical and dental expenses, taxes, interest expense, contributions, casualty/theft losses, miscellaneous deductions; and presents a summary of itemized deductions.

- Schedule G - Income Averaging: reviews base period income and adjustments, computation of averageable income, and calculates computation of tax.

B. REQUIRED EQUIPMENT

- Atari 400/800: 24K cassette, 32K diskette

- Basic cartridge

- Single disk drive (Atari 810, Percom)
  or
- Cassette recorder

II. GETTING STARTED

A. DISK USERS

1. LOADING INSTRUCTIONS

The TAX HANDLER is completely menu-driven with an auto-boot system.

- turn on your disk-drive
- insert the TAX HANDLER disk
- turn on your Atari
- the auto-boot system will automatically load the first program of the package, the TAX HANDLER PROGRAM MENU

2. THE TAX HANDLER PROGRAM MENU

This program contains the menu which drives all of the other programs. After the TAX HANDLER PROGRAM MENU has loaded, press any key and the menu will automatically print to the screen.

The menu looks like this:

THE TAX HANDLER

PROGRAM MENU

(1) Run Form 1040 - Part 1

(2) Run Form 1040 - Part 2

(3) Run Form 1040 - Part 3

(4) Run Schedule A - Itemized Deductions

(5) Run Schedule G - Income Averaging

What is your choice?

Enter the number associated with the program you would like to load.

Loading the programs without using the Program Menu:

Depending on the program you are loading, do the following:

- for Form 1040 - Part 1, type in RUN"D:F1Ø4Ø1", then press (RETURN)

- for Form 1040 - Part 2, type in RUN"D:F1Ø4Ø2", then press (RETURN)

- for Form 1040 - Part 3, type in RUN"D:F1Ø4Ø3", then press (RETURN)

- for Schedule A, type in RUN"D:SCHEDULA", then press (RETURN)

- for Schedule G, type in RUN"D:SCHDULG", then press (RETURN)

It is recommended that all users use the Program Menu.

B. CASSETTE USERS

1. LOADING INSTRUCTIONS

The cassette version of the TAX HANDLER is identical to the disk version in all respects except - it is not equipped with the TAX HANDLER PROGRAM MENU. Hence, you must advance your tape recorder to the appropriate line counter numbers and load the programs separately.

2. LOADING PROCEDURE

- for F1040 1, advance line counter to 10, type in CLOAD, then (RETURN)

- for F10402, advance line counter to 106, type in CLOAD, then (RETURN)

- for F10403, advance line counter to 163, type in CLOAD, then (RETURN)

- for SchedulA, advance line counter to 214, type in CLOAD, then (RETURN)

- for SchedulG, advance line counter to 278, type in CLOAD, then (RETURN)

III. THE PROGRAMS

A. FORM 1040 - PART 1

Both disk and cassette users should refer to the loading instructions detailed in the "Getting Started" portion of this documentation, to run this program.

The menu for Form 1040 - Part 1 appears as follows:

FORM 1040 MENU

(1) Review Filing Section

(2) Review Exemptions Section

(3) Review Income Section

(4) 1040 File Menu

(5) Return to Main Program

What is your choice?

First, a few pointers:

-- You should notice the blinking cursor. This is a machine language subroutine used to help you locate the cursor on the screen.

-- Option 4 is to load or save the 1040 File. This file will contain information you have previously entered, and is the same file for all 3 of the 1040 Programs.

-- Do not use decimals. Round figures to nearest dollar. (The IRS allows you to do this)

CASSETTE USERS

-- Form 1040 FILE MAINTENANCE

To generate your working tax file you must follow this procedure.

(1) Load F1040 1, input data, save file

(2) Load F1040 2, load file from F1040 1, input data, save file

(3) Load F1040 3, load F1040 2 file, input data, save file

DISK USERS

-- Should maintain their files on a separate preformatted diskette (see your Atari DOS manual for formatting instruction). All files will be automatically updated in a central file. Remember to always load in the central 1040 file before making any changes in any of the three programs, and then resave that file.

1. REVIEW FILING SECTION

After selecting Option 1, the following screen will appear:

FILING STATUS

(1) ____ Single

(2) ____ Married filing joint return (even if only had 1 income)

(3) ____ Married filing separately

Name of Spouse _____ Soc. Sec. # _____

(4) ____ Head of Household

Child's name _____

(5) ____ Qualifying Widow(er) with dependent child

Enter [1] to [5] or [N]ext or [RETURN]

Enter 1-5 to input your applicable situation. If you key 1-5, you can press any key but the (SPACEBAR), and that item will be 'X'ed and recorded. If you key (SPACEBAR), all applicable information for that item will be erased.

Under category 3, Married Filing Separately, use the following procedure to input information:

Press 3, then any key. A blinking cursor will prompt you to input name of spouse. Input name, then press return. Next input the name, then press return. Next input the social security number using digits only (the hyphens are provided automatically by the program)

IMPORTANT: To calculate the later computations, you must complete this section!

To return to the first menu, press (RETURN), or to go on to the next page (EXEMPTIONS), key in (N).

2. REVIEW EXEMPTIONS SECTION

After selecting Option 2 on the main menu, (or pressing [N]), the following screen will appear:

EXEMPTIONS

6A ____ Yourself ____ 65 or over ____ Blind

6B ____ Spouse ____ 65 or over ____ Blind

6C Enter dependent children's names

_____

6D ____ Total # of other dependents

6E ____ Total # of exemptions claimed

Enter (6A) - (6D) or (N)ext or (RETURN)

Enter 6A-6D as your situation applies.

NOTE: This is the only section in the package not equipped with a blinking cursor to guide you on each line. To input data on lines 6A and 6B, press 6, then a or b, then any key but spacebar to flag each category. For example, to declare only yourself as exempt, press 6 then a, then any key, an X will appear next to yourself. Next, press [spacebar] twice to ignore the other two categories.

To input dependent's names, press 6, then C. A cursor will appear prompting you to input first dependent's name. The return key is then used to skip to the next line. You have space to input up to five (5) dependents.

To return to the main menu, press (RETURN), or to go on to the next page (INCOME), key in (N).

3. REVIEW INCOME SECTION

After selecting Option 3 on the main menu (or pressing [N]), the following screen will appear:

INCOME

7	Wages, Salaries, etc.		_____
8	Interest Income		_____
9A	Dividends	_____	
9B	Exclusion	_____	
9C	(9A-9B)		_____
10	State & Local Tax Refund		_____
11	Alimony Received		_____
12	Business Income (Loss)		_____
13	Capital Gain (Loss)		_____
14	40% not included in 13		_____
15	Supplemental Gains		_____
16	Taxable P & A not on 17		_____
17A	Other Pens. & Annuities	_____	
17B	Taxable Amount		_____
18	Rents, Partnership, etc.		_____
19	Farm Income (Loss)		_____
20A	Unemployment Comp.	_____	
20B	Taxable amount		_____
21	Other Income		_____
22	TOTAL INCOME		_____

Enter (07*)-(21*) or (RETURN)

The computer is expecting 3 keys. For example, to enter item 13, key in 130; for 20A, key in 20A, etc. After selecting the item, key in the amount, then press (RETURN). For negative amounts include the minus sign.

Items 09B, 09C, 20B, and 22 are calculated for you. Thus, you cannot access these items.

If you accidentally input a value in the wrong line, reopen the line and type in either 0 or the correct value, then press [RETURN]. Follow this procedure with the other programs as well.

When finished entering the data press (RETURN) to return to the menu.

4. 1040 FILE MENU: After you have entered all the necessary data, you are ready to save your tax files.

To load or save the 1040 File, select Option 4 on the main menu. The following menu will appear.

1040 FILE LOAD

(1) Cassette Load

(2) Diskette Load

(3) Cassette Save

(4) Diskette Save

(5) Return to Main Menu

What is your choice?

Choose the appropriate option to either load or save the tax data.

NOTE: When saving tax data, the program will prompt you to load 1040 file into storage device. Remember to insert a preformatted disk or cassette in your drive or tape recorder. Then press any key to save the tax file.

5. RETURN TO MAIN PROGRAM

- Disk-users select this option to return to the TAX

- Cassette-users select this option to exit from the program.

B. FORM 1040 - PART 2

Both disk and cassette users should refer to the loading instructions detailed in "Getting Started" to run this program.

The menu for Form 1040 - Part 2 appears as follows:

FORM 1040 MENU

(1) Review Adjustments To Income and Tax Computation

(2) 1040 File Menu

(3) Return to Main Program

What is your choice?

1. REVIEW ADJUSTMENTS TO INCOME AND TAX COMPUTATION

After selecting Option 1, the following screen will appear:

ADJUSTMENTS TO INCOME B/F _____

23 Moving Expense _____

24 Emp. Business Expenses _____

25 Payments To On IRA _____

26 Payments to Keough Plan _____

27 Interest Penalty on E/W _____

28 Alimony Paid _____

29 Marriage Deduction _____

30 Disability Income Exp. _____

31 TOTAL ADJUSTMENTS _____

32 Adjusted Gross Income _____

TAX COMPUTATION

34A	Itemized Deductions	_____
34B	Allowable Contributions	_____
35	(32-34A) or (32-34B)	_____
36	$1,000 * # of Exempt (6E)	_____
37	Taxable Income (35-36)	_____
38	Tax	_____
39	Additional Taxes	_____
40	TOTAL (38 + 39)	_____

Enter (23*) - (39*) or (RETURN)

Again, the computer is expecting 3 keys. For example, to enter item 23, key in 230. After selecting the item, key in the amount, then press (RETURN). For negative amounts include the minus sign.

Items 31, 32, 34B, 35, 36, 37, 38 and 40 are calculated for you. Hence, you cannot access these items.

When finished entering the data press (RETURN) to return to the menu.

2. 1040 FILE MENU

Select Option 2 to save/load this tax data.

This procedure is identical to that in section 1.

DISK USERS - Your TAX FILE will be automatically updated.

CASSETTE USERS - This file now becomes your working file i.e. you will load this file into part 3.

C. FORM 1040 - PART 3

Both disk and cassette users should refer to the loading instructions detailed in "Getting Started" to run this program.

The menu for Form 1040 - Part 3 appears as follows:

FORM 1040 MENU

(1) Review Tax Credits or Other Taxes

(2) Review Payments or Balance/Refund Due

(3) Form 1040 File Load

(4) Return to Main Program

What is your choice?

1. REVIEW TAX CREDITS OR OTHER TAXES

After selecting Option 1, the following screen will appear:

TAX CREDITS - Bal. FWD _____

41	Credit for Elderly	_____
42	Foreign tax credit	_____
43	Investment Credit	_____
44	Credit for Polit. Contr.	_____
45	Credit for Child & Dep.	_____
46	Jobs Credit	_____
47	Resid. Energy Credit	_____
48	Other Credit	_____
49	TOTAL CREDITS	_____
50	Balance (40-49)	_____

OTHER TAXES

51	Self-Employment Tax	_____
52	Minimum Tax	_____

53 Alternative Min. Tax _____

54 Tax From P/Y Invest CR. _____

55 FICA Tax on Tips _____

56 Uncollectable RRTA & FICA _____

57 Tax on an IRA _____

58 Advance Earned Inc. CR. _____

59 TOTAL TAX (50 thru 58) _____

Key (41*) - (58*) or (N)ext or (RETURN)

Enter data in the same manner as before, except you only need to input 2 digits. When done, key (N) to go on to the next page, (Option 2) or (RETURN) for menu.

2. REVIEW PAYMENTS OR BALANCE/REFUND DUE

After selecting Option 2, the following screen will appear:

PAYMENTS - Bal. FWD _____

60 Total Income Tax W/H _____

61 Est. Payments this year _____

62 Earned Income Credit _____

63 Amt. paid W/Form 4868 _____

64 Excess FICA & RRTA W/H _____

65 Credit for Tax on Oil _____

66 Reg. Inv. Co. Credit _____

67 TOTAL (55 thru 61) _____

*68 BALANCE DUE (Amount Overpaid) _____

Enter [60] - [66] or (RETURN)

***NOTE:** Depending on the situation, line 68 will read either BALANCE DUE, or AMOUNT OVERPAID, depending on who owes who.

3. FORM 1040 FILE LOAD

When finished entering data, select Option 3 on the main menu to save/load the tax file. This is now your master tax file.

D. SCHEDULE A - ITEMIZED DEDUCTIONS

SCHEDULE A can be used in conjuction with our other tax schedules to both ease your tax preparation and save you taxes.

The program is divided into sections in the same manner as the actual SCHEDULE A form. To determine what you can and cannot deduct, it is suggested that you refer to the instructions that you receive from the IRS; we also provide you with the actual Schedule A form. It can be found at the end of this section.

1. The first screen in the program is the main menu. You can review medical and dental expenses, review taxes and interest expense, review contributions and casualty/-theft losses, review miscellaneous deductions and summary, or save and/or load tax data.

   The main menu appears as follows:

SCHEDULE A MENU

(1) Review Medical and Dental Expenses

(2) Review taxes and Interest Expense

(3) Review Contributions and Casualty/Theft Losses, Miscellaneous Deductions

(4) Review Summary of Expenses

(5) File Maintenance

(6) Return to Main Program

What is your choice?

2. REVIEW MEDICAL AND DENTAL EXPENSES

After selecting Option 1, the following screen will appear:

MEDICAL AND DENTAL EXPENSES

010 Medicine and Drugs. . . . . _____

020 1% F1040 line 33. . . . . _____

030 Line 1 - line 2 (M/B > 0) . . . . . _____

040 Total ins. prem. paid . . . . . _____

050 a. Doctor, dentist, etc . . . . . _____

051 b. Transportation . . . . . _____

052 c. Other (Itemize). . . . . _____

053 . . . . . _____

054 . . . . . _____

055 . . . . . _____

056 . . . . . _____

057 . . . . . _____

058 . . . . . _____

059 . . . . . _____

060 Total (3 thru 5C) . . . . . _____

070 Enter 3% F1040, line 33 . . . . . _____

080 line 6 - 7 (M/B > 0). . . . . _____

090 ½ of line 4 . . . . . _____

100 TOTAL MEDICAL EXPENSES. . . . . _____

Enter (010-090) or (N)ext or (RETURN)

The computer is expecting 3 keys. For example, to input medicine and drug expenses, key in 020. A blinking cursor will appear at line 020 prompting you to enter the appropriate amount. After entering the amount, press (Return).

Follow the same procedure when entering all data. Keep in mind that line 030, 060, 070, 080, 090, 100 are calculated by the program, so you are unable to open these lines.

After inputting all necessary data press (RETURN) to return to the main menu, or (N) to go on the the next section - TAXES AND INTEREST EXPENSES.

3. REVIEW TAXES AND INTEREST EXPENSE

After selecting Option 2, the following screen will appear.

TAXES

110 State and Local Income. . . . . _____

120 Real Estate . . . . . _____

130 a General Sales . . . . . _____

131 b General Sales on MV . . . . . _____

140 Other . . . . . _____

141 . . . . . _____

142 . . . . . _____

143 . . . . . _____

TOTAL TAXES (11 thru 14). . . . . _____

INTEREST EXPENSES

160 a Home Mortgage - Fin'l Inst . . . . . _____

161 b Home Mortgage - Individual . . . . . _____

170 Credit and Charge Cards. . . . . _____

180 Other. . . . . _____

181 . . . . . _____

182 . . . . . _____

183 . . . . . _____

184 . . . . . _____

TOTAL INTEREST EXPENSE. . . . . _____

Key (110-185) or (N)ext or (RETURN)

As before the same rules for entering dates hold. Remember, the computer is expecting 3 digits.

4. REVIEW CONTRIBUTIONS AND CASUALTY/THEFT LOSSES

After selecting Option 3, the following screen will appear:

CONTRIBUTIONS

200 a Cash Contributions. . . . . _____

201 b Cash cont. = 3000 . . . . . _____

202 . . . . . _____

203 . . . . . _____

210 Other than Cash . . . . . _____

220 Carryover from prior yr . . . . . _____

230 TOTAL CONTRIBUTIONS . . . . . _____

CASUALTY OR THEFT (LOSS)ES

240 Total casualty/theft loss . . . . . _____

250 a. Union/Professional dues. . . . . _____

251 b. Tax prep. fee. . . . . _____

260 Other . . . . . _____

261 . . . . . _____

262 . . . . . _____

263 . . . . . _____

TOTAL CAS/THEFT & MISC. LOSS. . . . . _____

Key (201-263) or (N)ext or (RETURN)

Once again the same rules for entering data apply. After selecting (N) for next page, the following screen will appear.

Select 1 of the following situations

(1) Single Taxpayer or Unmarried Heads of Household

(2) Married Filing Jointly or Qualifying Widows and Widowers

(3) Married Filing Separately

What is your choice?

5. REVIEW MISCELLANEOUS DEDUCTIONS AND SUMMARY

Select the category that applies. The final screen will automatically appear with the previously inputted data automatically adjusted in the summary of itemized deductions. This screen appears as follows:

SUMMARY OF ITEMIZED DEDUCTIONS

A. Total Medical line 10 . . . . . _____

B. Total Taxes line 15 . . . . . _____

C. Total Interest line 19. . . . . _____

D. Total Contrib. line 23. . . . . _____

E. Total Misc/Casual line 27 . . . . . _____

280 Add lines 10, 15, 19, 23, 27 . . . . . _____

290 From filing status . . . . . _____

300 ITEMIZED AMT (28-29) M/B > 0 . . . . . _____

6. FILE MAINTENANCE MENU

When finished entering data, select Option 5 on the SCHEDULE-A main menu. (File Maintenance) to save the tax information.

The following screen will appear:

1040 FILE LOAD

(1) Cassette Load

(2) Diskette Load

(3) Cassette Save

(4) Diskette Save

(5) Return to Main Menu

E. SCHEDULE G - INCOME AVERAGING

Here's a program that everyone should have in their software library. Schedule G can be used in conjunction with our other tax schedules, or used by itself to help you save taxes.

If your income this year is much greater than the average of your income for the past 4 base period years (1978-1981), you may be able to pay less tax by income averaging. To see if you qualify, load the program and follow the instructions outlined below.

The first screen to appear is the main menu:

SCHEDULE G

(1) Review Base Period
Income And Adjustments

(2) Review Computation of Averageable Income

(3) Review and Calculate Computation of Tax

(4) File Maintenance Menu

(5) Return to Main Program

What is your choice?

The first thing you will want to do is to review your base period income and adjustments. To do so, select option 1 on the main menu.

After selecting option 1, the following screen will appear:

FIGURE YOUR INCOME FOR 1978 - 1981

01 Amount from 1978 line 34. . . . . _____

02 Total 1978 Exempt. *$750. . . . . _____

03 Line 1 - line 2 (M/B > 0) . . . . . _____

04 Amount From 1979 line 34. . . . . _____

05 Total 1979 Exempt. *$1000 . . . . . _____

06 Line 4 - line 5 (M/B > 0) . . . . . _____

07 Amount from 1980 line 34. . . . . _____

08 Total 1980 Exempt. *$1000 . . . . . _____

09 Line 7 - line 8 (M/B > 0) . . . . . _____

10 Amount from 1981 line 34. . . . . _____

11 Income earned outside USA . . . . . _____

12 Add lines 3, 6, 9, 10 & 11. . . . . _____

Key [01 - 11] or [N]ext or [RETURN]

To input income information for the past four (4) base period years, press the appropriate keys. Remember, the computer is expecting two (2) digits. For example, to input 1978 taxable income of 10,000 frist press 01. Then input the amount and press [RETURN] follow the same procedure for each line.

If you make a mistake, and are still on that line, you can use the Back Space (Back S) key to backtrack and correct the error. Otherwise, press the line number containing the error, and reinput the correct data.

If you accidentally select a line you do not wish to use, input 0, then press RETURN.

After entering the necessary amounts, press [N] to continue to the next page.

COMPUTATION OF AN AVERAGEABLE INCOME

(13) Amt. on line 12 + 30%

(14) Taxable Income 1982 line 37

(15) Penalty for Excess. Dist'n

(16) Line 14 - Line 15

(17) Comm. Prop. State

(18) Line 16 - Line 17

(19) Amount from Line 13

(20) Line 18 - Line 19

(Averageable Income)

On this screen, you need enter only three amounts. The same rules apply for entering data as in the first screen.

If your averageable income is less than or equal to $3000, you do not qualify for Income Averaging. If this is the case, you will be informed by a message on the screen, and will be returned to the main menu. If you do qualify, you will be asked if your filing status is:

1. Single taxpayer.
2. Unmarried head of household.
3. Married taxpayers filing jointly, or qualifying widows and widowers.
4. Married taxpayers filing a separate return.

After selecting the appropriate option, the screen will automatically print out your tax computating using the income averaging method.

Line 34 displays the tax you owe under this method. Beware, compare this amount with what you would normally have to pay because it is not always the best method, even if you do qualify.

FILE MAINTENANCE MENU

To save the data you entered, and the results calculated by the program, pick Option 4 from the main menu. This menu will appear on the screen:

1040 FILE LOAD

(1) Cassette Load

(2) Diskette Load

(3) Cassette Save

(4) Diskette Save

(5) Return to Main Menu

What is your choice?

The procedure is identical to that used with the other programs. Remember to insert your 1040 File in storage device (either disk drive or cassette recorder), then press any key to save the data.

The menu is self-explanatory . . . the whole program requires less than 20 entries to calculate your tax through Income Averaging. and will be accurate within 10$ either way. We hope it saves you some money!